

FY27 University Travel Research Program

The legislative appropriation for the Montana Travel Research Program in FY26 was \$1,466,444.00. Proposed projects for FY27 are listed below; however, FY27 appropriations may not be confirmed until mid or late-2026. ITRR experienced a decrease in appropriated funding (from 2.5% to 2%) and has therefore estimated an FY27 budget of approximately \$1,242,009, based on the previous year's lodging tax collection. The Research Committee of the Tourism Advisory Council (TAC) reviews and recommends ITRR research projects for each fiscal year. The following projects were presented to the TAC Research Committee for discussion on January 12, 2026. Project scopes and budgets are provided below for consideration at the February 18, 2026, TAC meeting.

Please note that the costs associated with the research project are approximations and may be adjusted. Additionally, the research project's scopes and objectives are initially formulated through submissions and general discussions with submitters and the TAC. These scopes and objectives are subject to refinement and increased specificity following community and stakeholder input. This iterative process is intended to ensure that the research outcomes align effectively with the evolving needs of Montanans.

Research projects and costs for FY27:

<u>FY27 Proposed Projects and Administration Budget</u>	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$53,500.00	\$472,128.75	\$525,628.75
2. 2026 Economic Impacts and 2027 Outlook	\$5,400.00	\$53,990.46	\$59,390.46
3. Tourism and Recreation Monitoring	\$5,000.00	\$66,550.53	\$71,550.53
4. ITRR Data Mining	\$0.00	\$21,256.35	\$21,256.35
5. Emerging Issues	\$0.00	\$16,367.05	\$16,367.05
6. Survey Kits	\$3,000.00	\$26,387.33	\$29,387.33
7. Resident Attitudes	\$5,000.00	\$35,700.21	\$40,700.21
8. Data Visualization & Research Collaboration	\$16,500.00	\$22,798.85	\$39,298.85
9. Fiscal Year Projects	\$17,600.00	\$211,041.10	\$228,641.10
9a. Pilot Community Grant	\$3,520.00	\$42,208.22	\$45,728.22
9b. Resident Travel Study (Year Long)	\$10,560.00	\$126,624.66	\$137,184.66
9c. Butte Trail Research	\$1,760.00	\$21,104.11	\$22,864.11
9d. Understanding Adaptive Recreation	\$1,760.00	\$21,104.11	\$22,864.11
Administration	<u>\$57,940.00</u>	<u>\$89,691.94</u>	<u>\$147,631.94</u>
Total	\$163,940.00	\$1,015,912.59	\$1,179,852.59

**Operations include supplies, travel, repairs, software, insurance, publications, communications, postage, printing, conferences, computers, contracted services, maintenance, subscriptions, background checks, and network charges.*

Quarterly Nonresident and Resident Visitor Analysis (Ongoing)

Introduction

In July 2009, ITRR began the nonresident visitor survey throughout the state. This ongoing, high-value project provides quarterly data, which is uploaded to the data dashboard for anyone to use for decision-making, presentations, and planning. It also provides the nonresident visitation numbers to Montana, spending data, and the economic impact of tourism on the state.

Purpose and Objectives

The main purposes of this project are to 1) assess nonresident visitor characteristics on an ongoing basis, 2) estimate nonresident visitor numbers quarterly, 3) estimate nonresident expenditures quarterly, and 4) provide quarterly data on the report builder for clients to profile the characteristics of any nonresident visitor segment. A secondary purpose of this project is to further assess or explore nonresident niche markets as the need for exploration presents itself. Finally, the purpose is to intercept residents (when nonresidents are unavailable) to ask custom questions that emerge as important tourism or recreation-related topics.

Objectives:

- Describe visitors to Montana in terms of demographics, trip characteristics, travel behavior, and expenditures in the state on a quarterly basis.
- Update information used in ITRR's model to estimate quarterly and annual visitation and economic impacts.
- Utilize existing survey personnel for niche market surveys and/or address travel research needs as they arise.
- To survey residents on emerging tourism and recreation-related topics (when nonresidents are not available to survey).

Methods

- 1) Front-end intercept survey: Nonresidents are intercepted at Montana's gas stations, rest areas, and airports. This portion of the nonresident survey asks basic questions about their trip, demographics, and spending on an iPad. When nonresidents are not available, the surveyor will intercept residents with different questions each quarter.
- 2) Mail-back or online survey: After nonresidents have been asked the questions on the above front-end intercept survey, they are provided a longer survey in a postage-paid envelope. They can choose to complete the printed version or access the survey online. This additional data includes activities, sites visited, routes driven, attractions to the state, information sources used, lodging type, and technology use.
- 3) Supplemental surveys: a methodology for niche markets or other research needs will either be on-site interviews, online surveys, or mail-back surveys.
- 4) Proportion counts: At a sample of Montana borders, which are utilized in ITRR's model for estimating nonresident visitation to the state, and six of the airports (Billings, Bozeman, Great Falls, Helena, Kalispell, and Missoula), surveyors will conduct sample counts of nonresident vehicles entering the state and nonresident visitors boarding planes at the airports.

Outcomes

- Quarterly data will be cleaned, coded, and uploaded to the ITRR website interactive data tool for use by the public to produce their own summaries regarding nonresidents to MT.
- The economic impact of nonresident visitation to MT is generated from this data set on an annual basis, while spending is estimated on a quarterly basis.
- County and travel region estimates of nonresident spending are produced, and reported via an annual report, as well as uploaded to a data dashboard containing historical and current estimates.
- Press releases and presentations will be part of the dissemination of the results.

Anticipated Timeframe: on-going

<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$53,500.00	\$472,128.75	\$525,628.75

2026 Economic Impacts and 2027 Outlook (Ongoing)

Purpose and Objectives

The purpose of the study is to estimate annual nonresident visitation to Montana, the economic impact of visitors to Montana, and project visitation for the year 2026. The objective is to disseminate this information widely among Montanans through Bureau of Business of Economic Research (BBER) Economic Outlook Seminars in 8-10 Montana cities, the 2026 Outlook article, the Governor's Conference on Tourism, and various group events across the state.

Objectives:

- To estimate 2026 visitation through secondary data sources and ITRR nonresident data.
- To project 2027 tourism and recreation visitation numbers based on trend data, national projections, and indicator data from the state and region.
- To conduct the annual outlook survey for MT tourism business owners traveling with BBER.

Outcomes

The following information will be provided from this project:

1. The Tourism and Recreation Outlook 2027 will be presented with the Bureau of Business and Economic Research (BBER) to 8-10 cities in Montana (Helena, Great Falls, Missoula, Billings, Bozeman, Butte, Kalispell, Sidney, and Miles City) and for other groups and conferences as requested.
2. The ITRR Travel Outlook article.

- Initial economic and visitation data for 2027, crucial for the planning of tourism-related businesses and agencies, will be accessible in January 2027, with the finalized figures becoming available in late April 2027. The ITRR website will contain the newly updated information.

Anticipated Timeframe: On-going

<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$5,400.00	\$53,990.46	\$59,390.46

Tourism and Recreation Monitoring (Ongoing)

Purpose and Objectives

The purpose of this project is to provide travel, tourism, and recreation trend data to the public through website updates and email summaries. Information and data for this project are a combination of primary data collection, secondary data, and reports from other entities.

Objectives:

- Continually collect and update trend data on the ITRR interactive data web page to include skier visits, airport deboarding, 3-question resident attitude, nonresident visitation, nonresident expenditures, nonresident expenditures by location, National Park Service visitation, and the 4% bed tax revenues.
- Disseminate travel data and research from reliable companies, e.g., STR Lodging, USTA, U.S. Dept. of Commerce.
- To collect, summarize, and distribute regional and national tourism research information to Montana CVBs, travel regions, and the MT Office of Tourism as it becomes available.
- Continue work with Parks and Outdoor Recreation Division (previously State Parks and Fishing Access Sites), including primary data collection and monitoring of visitation numbers and trends.

Outcomes

- The interactive web page will be upgraded as needed, and new trend data sets will be updated annually, quarterly, or monthly, depending on the data type.
- As new data becomes available, press releases will be written and disseminated around the state through the University of Montana news media.
- TAC, Montana Office of Tourism and Business Development, regions, and CVBs will receive updates on travel trends in the region, nation, and internationally.

Anticipated Timeframe: On-going

<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$0.00	\$21,256.35	\$21,256.35

ITRR Data Mining (Ongoing)

Purpose

This project will allow ITRR to mine data sets, including the nonresident data set, when it is not possible to extract information through the interactive web page. When questions arise that cannot be answered with the interactive report builder on the website or through previous niche news and reports, ITRR staff will generate the report if the sample size is adequate and if the request is useful beyond an individual's use. There is a data request option on the ITRR website to help facilitate these inquiries.

Yearly reports generated:

- Economic impacts on counties and regions**
- Spending of airline travelers by MT airport**

Reports to be generated:

- Regional transportation analysis: Major attraction zone of influence.** This project was a specific request, and ITRR determined that mining several years of the nonresident survey data in the "main attraction" category will provide the zone of influence of these attractions. This includes everything from landscape to historic features, parks, and some activities.

- **Additional analysis of niche activities.** Depending on the needs, this could be one or numerous reports to look more specifically at activities.

Methods

Data will be extracted from the available data sets and analyzed by the chosen topic. Where appropriate, correlations and multivariate analysis will be conducted on data to provide further insights into the Montana traveler.

Outcomes

1. Reports on the results will be written as needed.
2. Journal articles will be written and submitted for publication.
3. Presentations on data findings will be provided at conferences and meetings.

Anticipated Timeframe: On-going

<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
\$0.00	\$27,680.23	\$27,680.23

Survey Kits (Ongoing)

Purpose and Objectives

The purpose of the survey kit is to assist communities, organizations, or event managers in researching their visitors in terms of characteristics, satisfaction, and spending. Due to the nature of the “kit,” utilizing a standard set of questions, ITRR is able to keep the cost below market value. ITRR therefore, uses bed tax funding to supplement the costs for MT communities.

Methods

Survey collection methods are determined by the type of event to be researched. The methods range from email surveys to intercept surveys.

Outcomes

1. Typically, an annual range of 4 to 7 survey kits are administered.
2. A report is written for the community or organization describing the visitors’ characteristics, satisfaction with the event, and spending by visitors.
3. If the total number of participants is obtained, the total dollar contribution of the event can be assessed.

Anticipated Timeframe: on-going

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
\$3,000.00	\$26,387.33	\$29,387.33

Updating the Resident Travel in Montana Report (One-time)

Introduction

Montanans are deeply connected to their state. Residents travel within Montana for recreation, work, family visits, medical care, shopping, and events. While nonresident visitors contribute billions of dollars annually to Montana’s economy, resident travel plays a critical and often underexamined role in sustaining local businesses and communities. Intrastate travel keeps dollars circulating within Montana. Research in other regions has shown that when residents choose in-state travel over out-of-state alternatives, gains in gross state product and employment increase because spending remains local. Additionally, “staycation” and proximity tourism trends highlight environmental and community benefits—shorter travel distances reduce emissions while encouraging residents to rediscover and invest in their own regions. Montana’s last [comprehensive resident travel study](#) (2018, using 2017 data) established a baseline understanding of travel patterns, spending, and economic contributions. However, travel behavior has shifted significantly due to economic changes, population growth, infrastructure development, and the lasting effects of the COVID-19 pandemic, as well as newer funding sources available to market within MT. An updated 2026–2027 study is essential to provide current data to inform economic development, tourism planning, infrastructure investment, and statewide policy decisions.

Purpose

The purpose of this project is to update and expand the Resident Travel in Montana report for 2026–2027 by estimating:

- The volume and frequency of resident travel within Montana (50+ miles from home)
- Resident travel spending by region and county
- Travel flows and destination patterns across the state
- Differences in travel purpose, behavior, and expenditures

This updated report will provide policymakers, tourism professionals, economic developers, and community leaders with reliable, current data on the economic and social contribution of intrastate travel.

Objectives

1. Estimate the Annual Volume of Resident Travel
2. Measure Economic Contribution
3. Map Travel Patterns and Flows
4. Analyze Travel Purpose and Behavior

Methods

The 2026–2027 study will build upon the methodology used in the previous resident travel report to ensure comparability, while incorporating modern data collection tools to improve accuracy and reach.

- Intercept Survey Data Collection
- Follow-Up Survey (Digital and Mail Option)

Anticipated Timeframe: June 1, 2026- May 31, 2027	<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total</u>
	\$10,560.00	\$126,624.66	\$137,184.66

Recreation Patterns of Different Trail Users (Butte, MT) (One-time)

Introduction

Emerging issues of recreation conflict and increasingly diverse recreation styles highlight the need for informed planning in popular recreation areas within and near Butte, Montana, specifically Thompson Park, Maud S Canyon, and segments of the Continental Divide National Scenic Trail. A central management question concerns whether to prioritize technical trails for advanced riders and racers or to focus on more accessible routes for casual users. Butte hosts major recreational events, including the Butte 100 and various trail running races, making it critical to understand the social, economic, and environmental impacts of these activities. Despite the growing importance of these areas, there remains a significant data gap regarding year-round recreation use. Specifically, limited information exists about:

- Where visitors are coming from and their demographic characteristics
- How these recreation areas contribute to local tourism
- How to balance trail difficulty with accessibility
- Visitors’ perspectives on new developments and infrastructure
- The extent to which visitors rely on these recreation opportunities to meet their recreation needs and support their well-being

Purpose

The primary goal of this study is to gather comprehensive data on trail use patterns, user demographics, and economic value across spring, summer, fall, and winter seasons using new innovative research techniques with a University of Montana professor. The findings will support management agencies—including the U.S. Forest Service, Butte-Silver Bow, and the East Ridge Foundation- in developing strategic plans for future trail design and management that accommodate diverse user groups. Additionally, this study will provide valuable insights for communities and businesses across the Southwest Montana Tourism Region to inform recreation amenity development.

Objectives:

1. Quantify relative visitor flow volumes within these recreation areas.
2. Spatially define use patterns of various activity groups (e.g., hikers, bicyclists, runners, fat tire bikers).
3. Define visitor characteristics, including group size, residence, age, activity type, and place dependence.
4. Examine visitors’ perspectives on current and future management, development, and programming.

Methods

To meet these objectives, the study will employ the following data collection and analysis strategies:

1. Visitor Flow Volumes
2. Spatial Use Patterns
3. Visitor Characteristics
4. Visitor Perspectives on Management

Outcome

This study will produce a comprehensive, year-round assessment of recreation use across Thompson Park, Maud S Canyon, and segments of the Continental Divide National Scenic Trail. Expected outcomes include:

- Reliable data on visitor volumes and seasonal patterns
- Detailed spatial maps of activity-specific use patterns
- A clear profile of visitor demographics and recreation behaviors
- Insight into visitor preferences regarding trail difficulty, access, development, and programming
- Evidence of the social and economic importance of these recreation areas

These findings will directly inform trail design, infrastructure investments, event planning, and long-term recreation management strategies. Ultimately, the study will support sustainable recreation development that balances accessibility, technical challenge, tourism growth, and environmental stewardship in the Butte region.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$1,760.00	\$21,104.11	\$22,864.11

Understanding Adaptive Recreation (One-time)

Introduction

The Montana State Parks Foundation (MSPF) leads the Park Accessibility Project, a statewide initiative expanding access to outdoor recreation for individuals with disabilities. A key component is the provision of complimentary all-terrain wheelchairs (Action Track Chairs) at select parks, enabling individuals with mobility disabilities to access trails and natural areas previously out of reach. While early feedback has been positive, no formal evaluation has measured the program's impact on participants' health, independence, social connection, and overall well-being. Planned accessibility audits in 2025 will assess infrastructure but will not capture lived experience. This study fills that gap by centering the voices of adaptive equipment users at Lone Pine State Park and Lake Elmo State Park. The project aligns with the Montana Statewide Comprehensive Outdoor Recreation Plan (SCORP), particularly Goal 2: Expand Access and Inclusivity in Outdoor Recreation. By documenting user experience, this research ensures accessibility efforts are guided by community insight as well as facility standards.

Purpose

This study evaluates how complimentary use of all-terrain wheelchairs influences the quality of life for individuals with mobility disabilities in Montana State Parks.

Specifically, it seeks to:

- Assess impacts on independence, connection to nature, social participation, and overall well-being.
- Identify barriers reduced and those that remain.
- Gather operational feedback on equipment performance, reservations, trail access, and staff support.
- Generate evidence to guide program improvement, expansion, and sustainable funding.

Objectives

- Evaluate Quality-of-Life Impacts
- Strengthen the Evidence Base for Inclusive Recreation
- Support Long-Term Program Sustainability

Methods & Outcome

This study uses a mixed-methods design to capture both personal outcomes and operational insights, including interviews and surveys, to create a report that aligns with SCORP. Additionally, understanding adaptive recreation allows tourism to market parks that are accessible to various users.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$1,760.00	\$21,104.11	\$22,864.11

Supporting Montana Communities Through the Montana Community Tourism Grant Program

Introduction

The Pilot Community Tourism Grant Program (PCTGP), now renamed the Montana Community Tourism Grant Program, was established by the 2023 Montana Legislature through Senate Bill 540. This state-funded initiative aims to enhance Montana communities' economic vibrancy, sustainability, and unique qualities, making them attractive destinations for visitors.

Project Scope

The research project will support Montana communities participating in the program by providing tailored research, community and visitor surveys, and pre/post-program measurements to ensure data-driven decisions and measurable outcomes.

Objectives

1. **Data-Driven Decisions:** Provide communities with the research and tools needed to make informed decisions.
2. **Measure Impact:** Conduct pre- and post-program surveys to assess the long-term impact of tourism-related investments.

Methods

1. *Community and Visitor Surveys:*
 - Develop and distribute surveys to gather insights from community members and visitors.
 - Provide data communities can use to align tourism investments with local and visitor priorities.
2. *Community Research:*
 - Provide an assessment tool for communities to gather insights from residents about valued tourism-related investments, current infrastructure, assets, and amenities
3. *Visitor Research:*
 - Understand the types of visitors attracted to the community, their preferences, and perspectives.
4. *Pre/Post Measurement for Long-Term Impact:*
 - Provide pre-program assessments within the community and visitor surveys to establish baseline data. ITRR staff will work with each community on best practices for implementing assessments and surveys.
 - Conduct post-program surveys to measure changes in community perceptions, visitor feedback, and the impact of tourism investments.

Cohort 1	Cohort 2
Anaconda	Choteau
Big Timber	Fort Benton
Blackfeet Nation	Glasgow
Broadus	Glendive
Garfield County	Hardin
Havre	Red Lodge
Ronan	Tribal Tourism Region

Outcomes

ITRR will provide reports with analysis, reporting, and impact assessments based on data collected by participating communities. While communities are responsible for gathering and submitting required data, ITRR will offer guidance, tools, and technical assistance to support consistent, high-quality data collection. Using community-submitted data, ITRR will generate data-driven insights to inform decision-making, evaluate program effectiveness, and document measurable outcomes. Anticipated outcomes include increased economic activity, infrastructure investments benefiting residents and visitors, and enhanced community appeal as tourism destinations. The Montana Department of Commerce administers the

grants, and ITRR has supported the first two cohorts through the Pilot Community Tourism Grant Program (PCTGP), helping advance accountability, sustainability, and long-term program success.

<u>Operating</u>	<u>Salary/ benefits</u>	<u>Total*</u>
\$3,520.00	\$42,208.22	\$45,728.22

TRAVEL RESEARCH PROGRAM PROJECTS FY05-FY26

FY26

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$460,960.07	\$563,460.07
2. 2025 Economic Impacts and 2026 Outlook	\$6,400.00	\$60,269.94	\$66,669.94
3. Tourism and Recreation Monitoring	\$6,000.00	\$100,264.50	\$106,264.50
4. ITRR Data Mining	\$0.00	\$27,680.23	\$27,680.23
5. Emerging Issues	\$0.00	\$14,160.22	\$14,160.22
6. Survey Kits	\$3,000.00	\$11,039.76	\$14,039.76
7. Resident Attitudes	\$5,000.00	\$20,513.02	\$25,513.02
8. Data Visualization & Research Collaboration	\$15,000.00	\$149,314.23	\$164,314.23
9. Fiscal Year Projects	\$33,600.00	\$170,759.62	\$204,359.62
9a. The Impact of Sports Tourism in Montana	\$5,040.00	\$25,613.94	\$30,653.94
9b. Visitor Use Patterns in the Bob Marshall Wilderness Complex	\$5,040.00	\$25,613.94	\$30,653.94
9c. Analyzing the Impact of the Continental Divide Trail in Montana	\$5,040.00	\$25,613.94	\$30,653.94
9d. Montana on Screen: How Film Tourism Drives Visitor Spend	\$5,040.00	\$25,613.94	\$30,653.94
9e. Empowering Communities: The Role of Native Tourism in Montana's Economy	\$6,720.00	\$34,151.92	\$40,871.92
9f. Arts, Culture, and Community: Measuring the Impact Across Montana	\$3,360.00	\$17,075.96	\$20,435.96
9g. Supporting Montana Communities Through the Pilot Community Tourism Grant Program	\$3,360.00	\$17,075.96	\$20,435.96
Administration	<u>\$90,200.00</u>	<u>\$55,895.76</u>	<u>\$146,095.76</u>
Total	<u>\$261,700.00</u>	<u>\$1,070,857.35</u>	<u>\$1,332,557.35</u>

FY25

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$102,500.00	\$564,773.59	\$667,273.59
2. 2023 Economic Impacts and 2024 Outlook	\$6,400.00	\$65,919.60	\$72,319.60
3. Tourism and Recreation Monitoring	\$6,000.00	\$111,911.11	\$117,911.11
4. ITRR Data Mining	\$0.00	\$53,000.62	\$53,000.62
5. Emerging Issues	\$0.00	\$75,783.40	\$75,783.40
6. Survey Kits	\$0.00	\$10,952.64	\$10,952.64

7. Resident Attitudes	\$5,000.00	\$36,012.74	\$41,012.74
8. Data Visualization & Research Collaboration	\$15,000.00	\$193,018.77	\$208,018.77
9. Economic, Social, and Infrastructure Impact Tool	\$33,600.00	\$127,194.60	\$160,794.60
9a. Beyond Fossils: Investigating the Socioeconomic Footprint of Montana's Paleontological Tourism	\$5,040.00	\$19,079.19	\$24,119.19
9b. Beyond Artifacts: Unveiling the Contributions and Impacts of Montana Museums	\$6,720.00	\$25,438.92	\$32,158.92
9c. Understanding the Impact of Montana Meetings and Conventions	\$3,360.00	\$12,719.46	\$16,079.46
9d. Montana's Outfitting Industry: Economic Impact and Industry-Client Analysis	\$6,720.00	\$25,438.92	\$32,158.92
9e. Navigating Water Challenges: A Study of Flathead Lake Levels Impacts on the Tourism Economy	\$3,360.00	\$12,719.46	\$16,079.46
9f. Understanding Tourist Disengagement's Influence on Montana Tourism	\$1,680.00	\$6,359.73	\$8,039.73
9g. Canyon Ferry Recreation Survey	\$6,720.00	\$25,438.92	\$32,158.92
Administration	<u>\$87,200.00</u>	<u>\$76,540.30</u>	<u>\$163,740.30</u>
Total	<u>\$255,700.00</u>	<u>\$1,315,107.36</u>	<u>\$1,570,807.36</u>

FY24

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$100,500.00	\$476,061.46	\$576,561.46
2. 2022 Economic Impacts and 2024 Outlook	\$6,400.00	\$55,898.16	\$62,298.16
3. Tourism and Recreation Monitoring	\$6,000.00	\$93,616.46	\$99,616.46
4. ITRR Data Mining	\$0.00	\$42,718.70	\$42,718.70
5. Emerging Issues	\$0.00	\$59,490.30	\$59,490.30
6. Survey Kits	\$0.00	\$9,472.03	\$9,472.03
7. Resident Attitudes	\$5,000.00	\$29,611.52	\$34,611.52
8. Data Visualization & Research Collaboration	\$13,000.00	\$174,830.18	\$187,830.18
9. Economic, Social, and Infrastructure Impact Tool	\$25,600.00	\$110,234.21	\$135,834.21
9.a Yellowstone Natural Disaster and Tourism Impacts and Recovery	\$6,400.00	\$22,046.84	\$28,446.84
9.b The Ever-Changing Dynamics of Short Term Rentals in Montana	\$1,280.00	\$16,535.13	\$17,815.13
9.c Montana Dark Skies: Understanding the Stargazing Visitor	\$7,680.00	\$27,558.55	\$35,238.55
9.d Uncovering the Eastern Montana Visitor	\$0.00	\$11,023.42	\$11,023.42
9.e Montana Agritourism and Recreation Business	\$10,240.00	\$33,070.26	\$43,310.26
Administration	<u>\$34,550.00</u>	<u>\$62,965.86</u>	<u>\$97,515.86</u>
Total	<u>\$191,050.00</u>	<u>\$1,114,898.87</u>	<u>\$1,305,948.87</u>

FY23

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
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1. Quarterly Nonresident Travel and Recreation Analysis	\$104,175	\$444,400.74	\$548,576
2. 2022 Economic Impacts and 2024 Outlook	\$5,400	\$55,898.16	\$61,298
3. Tourism and Recreation Monitoring	\$1,000	\$93,616.46	\$94,616
4. ITRR Data Mining	\$0	\$42,718.70	\$42,719
5. Emerging Issues	\$0	\$59,490.30	\$59,490
6. Survey Kits	\$0	\$9,472.03	\$9,472
7. Resident Attitudes	\$1,000	\$29,611.52	\$30,612
8. Data Visualization & Research Collaboration	\$8,000	\$165,784.25	\$173,784
9. Economic, Social, and Infrastructure Impact Tool	\$43,300	\$105,711.25	\$149,011
9.a Trail & Facility Use (2 sites)	\$6,186	\$15,102	\$21,287
9.b Economic and Infrastructure Impacts of events (4 sites)	\$12,371	\$30,203	\$42,575
9.c Economic Impact of Museums (2 sites)	\$6,186	\$15,102	\$21,287
9.d Dispersed Winter Activities (2 sites)	\$6,186	\$15,102	\$21,287
9.e Paleontology Impacts (2 sites)	\$6,186	\$15,102	\$21,287
9.f Indian Country Tourism Research (2 sites)	\$6,186	\$15,102	\$21,287
Administration	<u>\$33,200</u>	<u>\$ 64,065.86</u>	<u>\$97,266</u>
Total	\$196,075	\$1,070,769	\$1,266,844

FY22

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$88,005	\$311,753	\$399,758
2. 2021 Economic Impacts and 2022 Outlook	\$4,700	\$35,983	\$40,683
3. Tourism and Recreation Monitoring	\$1,695	\$47,166	\$48,861
4. ITRR Data Mining	\$0	\$30,537	\$30,537
5. Emerging Issues	\$300	\$37,191	\$37,191
6. Survey Kits	\$0	\$8,128	\$8,128
7. Resident Attitudes	\$500	\$17,685	\$18,185
8. Data Visualization & Research Collaboration	\$0	\$56,832	\$56,832
9. Understanding the New Visitor	\$2,000	\$10,919	\$12,919
10. Understanding Public Land Uses and Abuses	\$2,000	\$10,919	\$12,919
Administration	\$22,755	\$61,429	\$84,184
Total	\$121,955	\$628,542	\$750,497

FY21

	<u>Operations</u>	<u>Salary/Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$106,124	\$447,899	\$554,023
2. 2020 Economic Impacts and 2021 Outlook	\$4,700	\$38,177	\$42,877
3. Tourism and Recreation Monitoring	\$5,495	\$68,605	\$74,100
4. ITRR Data Mining	\$0	\$31,957	\$31,957
5. Emerging Issues	\$300	\$25,772	\$26,072
6. Survey Kits	\$2,000	\$8,316	\$10,316
7. Air Service Impacts	\$9,400	\$30,785	\$40,185
8. Negative/Positive Press/Social Media Impacts on Traveler	\$4,000	\$40,995	\$44,995
9. Impact and Usage of Short-term Rentals in Montana	\$2,000	\$21,474	\$23,474
10. Visitor Use Monitoring–Assessing River/State Park Use	\$3,200	\$56,502	\$59,702

11. Projected Impact of Visitation Caps in Glacier NP	\$4,000	\$25,070	\$29,070
12. Bicycling in MT: Supply-Side Review & Demand Profile	\$3,360	\$45,492	\$48,852
13. Residents' Attitudes toward Tourism and Impact/ Challenge to Community Character	\$4,845	\$17,142	\$21,987
14. Impact of Music Festivals and Concerts	\$5,000	\$22,371	\$27,371
15. Analysis of Montana Museum Visitors	\$1,400	\$23,555	\$24,955
16. Administration	<u>\$21,255</u>	<u>\$68,194</u>	<u>\$89,449</u>
Total	\$177,079	\$972,305	\$1,149,384

FY20

	<u>Operating</u>	<u>Salary/benefit</u>	<u>Total</u>
1. Quarterly Nonresident Travel and Recreation Analysis	\$90,325	\$433,588	\$523,913
2. 2019 Economic Impacts and 2020 Outlook	\$4,700	\$58,453	\$63,153
3. Tourism and Recreation Monitoring	\$11,100	\$18,256	\$29,356
4. ITRR Data Mining	\$0	\$50,915	\$50,915
5. Survey Kits	\$0	\$14,384	\$14,384
6. Emerging Issues	\$0	\$23,318	\$23,318
7. ITRR Interactive Website Upgrade	\$8,950	\$112,270	\$121,220
8. Eastern Montana data growth	\$900	\$30,365	\$31,265
9. Canadian Traveler Analysis	\$500	\$23,318	\$23,818
Administration	<u>\$18,300</u>	<u>\$67,349</u>	<u>\$85,649</u>
Total	\$134,775	\$832,215	\$966,990

FY19

<u>On-Going Projects</u>	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident and Resident Travel and Recreation Analysis	\$90,325	\$356,315	\$446,640
2. 2018 Economic Impacts and 2019 Outlook	\$5,200	\$65,665	\$70,865
3. Tourism and Recreation Monitoring	\$10,300	\$26,620	\$36,920
4. ITRR Data Mining (includes transportation zone of influence/attractions)	\$500	\$40,820	\$41,320
5. Panel Studies	\$1,025	\$21,160	\$22,185
6. Survey Kits	\$0	\$13,430	\$13,430
7. Emerging Issues	\$0	\$8,330	\$8,330
<u>One-Time Projects</u>			
1. What are repeat visitors looking for on a return trip?	\$0	\$9,080	\$9,080
3. Indian Country cultural and heritage tourism	\$4,225	\$29,260	\$33,485
4. Economics and characteristics of alpine skiing in MT**	\$11,500	\$17,540	\$29,040
7. Motorcycle touring	\$0	\$18,165	\$18,165
8. Using tourism to recruit new business	\$7,000	\$19,660	\$26,660
10. Tourism's impact on rural communities	\$500	\$6,660	\$7,160
11. Community tourism development case study – Gardiner (after development)	\$8,600	\$18,160	\$26,760
Administration	<u>\$14,500</u>	<u>\$53,460</u>	<u>\$67,960</u>
Total	\$153,675	\$704,325	\$858,000

FY18

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
1. Quarterly Nonresident Visitor Analysis	\$74,420	\$304,829	\$379,249
2. 2017 Economic Impacts and 2022 Outlook	\$4,900	\$60,629	\$65,529
3. Tourism and Recreation Monitoring	\$10,795	\$17,866	\$28,661
4. ITRR Data Mining	\$0	\$17,866	\$17,866
5. Panel Studies	\$1,000	\$10,964	\$11,964
6. Survey kits	\$0	\$6,414	\$6,414
7. Resident Travel in Montana	\$12,500	\$56,811	\$69,311
8. Montana Tourism Forecasting and Trends	\$2,000	\$65,938	\$67,938
9. Montana's Outfitter and Guide Industry: Businesses and Clients	\$5,500	\$33,479	\$38,979
10. Impact and Characteristics of Mountain Biking: Helena Case Study	\$1,600	\$34,350	\$35,950
Administration	\$20,880	\$28,958	\$49,838
Total	\$133,595	\$638,104	\$771,699

FY17

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$85,700	\$329,218	\$414,918
2016 Economic Impacts and 2017 Outlook	\$7,800	\$49,502	\$57,302
Tourism and Recreation Monitoring	\$11,000	\$38,834	\$49,834
Data Mining of ITRR data sets	\$0	\$18,677	\$18,677
Panel Studies	\$0	\$25,396	\$25,396
Survey kit	\$500	\$8,400	\$8,900
Resident Travel in Montana	\$4,052	\$36,064	\$40,116
Visitor Characteristics and Economic Analysis of Northeast Montana	\$8,405	\$43,268	\$51,673
Montana's Key Niche Activities for Visitation & Spending	\$500	\$25,396	\$25,896
Administration	\$25,170	\$52,078	\$77,248
Total	\$143,127	\$626,835	\$769,962

FY16

	<u>Operations*</u>	<u>Salary/benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$88,600	\$348,747	\$437,347
2016 Outlook and 2015 Economic Impacts	\$7,850	\$44,240	\$52,090
Monitoring of Tourism & Recreation in MT	\$8,700	\$13,225	\$21,925
Data Mining of ITRR data sets	\$0	\$16,951	\$16,951
Panel studies	\$26,500	\$16,951	\$43,451
Survey kits	\$2,250	\$6,124	\$8,374
Assessing Character of Place to Guide Geotourism and the Main Street Montana Project: A case study of two communities	\$3,130	\$26,924	\$30,054
Testing the impacts of Glacier Park bicycling on statewide tourism – current and future projections	\$2,250	\$26,924	\$29,174
Trends and Community Benefits of Tourism as Assessed through an Analysis of Resort Tax Collections and Usage	\$0	\$27,289	\$27,289
Administration	<u>\$20,822</u>	<u>\$38,002</u>	<u>\$58,824</u>
Total	\$160,102	\$565,377	\$725,479

FY15

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Quarterly Nonresident Visitor Analysis	\$92,382	\$308,407	\$400,789
2015 Outlook and 2014 Economic Impacts	\$8,243	\$32,340	\$40,583
Monitoring of Tourism & Recreation in MT	\$1,173	\$12,379	\$13,552
Economic impacts on Counties and Regions	\$5,865	\$28,549	\$34,414
Data Mining of ITRR data sets	\$2,765	\$19,961	\$22,726
Panel studies	\$22,765	\$25,693	\$48,458
Resource Library	\$0	\$22,360	\$22,360
Administration	<u>\$5,276</u>	<u>\$47,242</u>	<u>\$52,517</u>
Total	\$138,469	\$496,931	\$635,400

FY14

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2013 Economic Impacts and 2014 Outlook	\$7,000	\$46,839	\$53,839
Tourism and Recreation Monitoring	\$10,200	\$45,338	\$55,538
Data Mining of ITRR data sets	\$0	\$22,428	\$22,428
Quarterly Nonresident Visitor Analysis	\$90,200	\$364,375	\$454,575
Characteristics of Bicycle Tourism	\$0	\$9,668	\$9,668
Community Tourism Development Case Study – Before and After	\$9,500	\$29,097	\$38,597
Panel Studies	\$16,500	\$38,280	\$54,780
Survey kit	\$150	\$6,380	\$6,530
Administration	<u>\$16,702</u>	<u>\$54,804</u>	<u>\$71,506</u>
Total	\$150,252	\$596,914	\$767,461

FY13

Approved	<u>Operating</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2012 Economic Impacts and 2013 Outlook	\$400	\$38,510	\$38,910
Tourism and Recreation Monitoring	\$16,800	\$20,370	\$37,170
Data Mining of ITRR data sets	\$0	\$30,000	\$30,000
Quarterly Nonresident Visitor Study	\$79,000	\$162,500	\$241,500
MT tourism job analysis	\$8,000	\$48,200	\$56,200
Economic impact of the Beartooth Highway*	\$52,330	\$86,875	\$139,205
Connection between wildlands and nonresident visitors	\$0	\$10,435	\$10,435
Economic impact by counties	\$3,000	\$11,300	\$14,300
Case studies: impact of small town hotels on rural MT	<u>\$5,940</u>	<u>\$41,200</u>	<u>\$47,140</u>
Total Projects	\$165,470	\$449,390	\$614,860
Administration	<u>\$24,430</u>	<u>\$18,140</u>	<u>\$42,570</u>
Total Project and Admin. Budget	\$189,900	\$467,430	\$657,430

*\$50,000 approved by TAC. Remaining provided by Friends of the Beartooth

FY12

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2011 Economic Impacts and 2012 Outlook	\$400	\$33,380	\$33,780
Monitoring Tourism and Recreation	\$14,050	\$18,640	\$32,690
Data Mining of ITRR data sets	\$0	\$31,610	\$31,610
Quarterly Nonresident Visitor Analysis	\$53,375	\$175,540	\$228,915
Geotourists in shoulder and winter seasons	\$0	\$14,760	\$14,760
Geotourism mapguides – do they work?	\$1,000	\$23,000	\$24,000
Resident in-state vacation characteristics	\$3,875	\$38,300	\$42,175
Why do Nonresidents fly into airports outside of Montana?	\$0	\$10,900	\$10,900
Total Projects	\$72,700	\$346,130	\$418,830
Administration	\$24,130	\$32,910	\$57,040
Total Possible Project and Admin. Budget	\$96,830	\$379,040	\$475,870

FY11

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
2010 Economic Impacts and 2011 Outlook	\$3,300	\$22,000	\$25,300
Monitoring Tourism in Montana & Beyond	\$11,920	\$30,000	\$41,920
Data Mining of ITRR data sets	\$0	\$13,540	\$13,540
Quarterly Nonresident Visitor Analysis	\$46,910	\$216,835	\$263,745
Montana Accommodations: Establishing a Visitation Reporting System	\$1,000	\$23,405	\$24,405
Elected officials Attitudes Toward MT Tourism Charter	1,020	\$5,000	\$6,020
Literature Review on the Effects of Climate Change on Tourism	\$0	\$2,600	\$2,600
Total Project	\$64,150	313,380	377,530
Administration	\$22,980	\$28,300	\$51,280
Total Project and Admin. Budget	87,130	341,680	428,810

FY10

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$4,270	\$22,715	\$26,985
Monitoring Tourism in Montana & Beyond	\$28,850	\$30,180	\$59,030
Data Mining of ITRR data sets	\$125	\$10,922	\$11,047
Quarterly Nonresident Visitor Analysis	\$35,024	\$212,156	\$247,180
Geotourism -A Statewide Analysis	\$4,052	\$27,324	\$31,376
Economic Impact of the MT Alpine Ski Industry	\$2,750	\$25,511	\$28,261
Total Project	\$75,071	\$328,808	\$403,879
Administration	\$35,000	\$28,370	\$63,370
Total Possible Project and Admin. Budget	\$110,071	\$357,178	\$467,249

FY09

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Outlook and Economic Impacts	\$3,550	\$21,810	\$25,360

Monitoring Tourism in Montana	\$31,850	\$27,240	\$59,090
Data Mining	\$50	\$35,275	\$35,325
Indian Country Visitor and Non-Visitor Analysis	\$11,240	\$41,680	\$52,920
Crown of the Continent Geotourism Evaluation	\$11,500	\$47,405	\$58,905
In-depth Analysis of Montana's vacationers to Glacier and Yellowstone	\$10,730	\$63,530	\$74,260
Q3 nonresident survey	\$2,250	\$28,290	\$30,540
Consumer Show Visitors: Propensity to Visit MT	<u>\$6,850</u>	<u>\$28,100</u>	<u>\$34,950</u>
Total Project	\$78,020	\$293,330	\$371,350
Administration	<u>\$59,730</u>	<u>\$21,810</u>	<u>\$81,540</u>
Total Possible Project and Admin. Budget	\$137,750	\$315,140	\$452,890

FY08

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
CTAP – one community	\$2,550	\$10,620	\$13,170
Outlook and Economic Impacts	\$2,490	\$18,372	\$20,862
Monitoring Tourism in Montana (includes interactive website)	\$13,620	\$23,608	\$37,228
Data Mining	\$50	\$11,275	\$11,325
Survey Kit and testing	\$850	\$28,647	\$29,497
Branding Montana	\$86,600	\$25,256	\$111,856
Climate Change and Montana's Tourism and Recreation Industry	\$820	\$14,091	\$14,911
Region and CVB Advertisement Response and Visitation	\$30,220	\$10,185	\$40,405
Total Project	\$137,200	\$142,054	\$279,254
Administration	\$50,600	\$21,289	\$71,889
Project and Admin. Budget	\$187,800	\$163,343	\$351,143

FY07

	<u>Operating*</u>	<u>Salary/ Benefits</u>	<u>Total</u>
Data Mining of Nonresident/Resident Travel and Recreation	\$200	\$60,000	\$60,200
Monitoring Tourism in Montana	\$12,110	\$23,245	\$35,355
Outlook and Economic Impacts	\$2,640	\$17,415	\$20,055
Outfitter/Guide Industry Analysis	\$17,350	\$23,395	\$40,745
Agritourism	\$12,180	\$26,630	\$38,810
Shifting Economy to Amenity Resources	\$2,500	\$20,740	\$23,240
Expectations	\$250	\$9,760	\$10,010
Cultural Tourism Case Study	\$2,750	\$17,610	\$20,360
Total Project	\$49,980	\$198,795	\$248,775
Administration	\$44,600	\$21,275	\$65,875
Total Project and Admin. Budget	\$94,580	\$220,070	\$314,650

FY06

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Economic Impacts 2005 and Travel Outlook 2006	\$2,600	\$21,222	\$23,822

2005-06 CTAP and Resident Attitudes	\$9,000	\$29,530	\$38,530
Monitoring Tourism in Montana	\$3,700	\$18,427	\$22,127
2005 Nonresident and Resident Travel and Recreation Survey	\$47,000	\$178,809	\$225,809
Total Project	\$62,300	\$247,988	\$310,288
Administration	\$45,200	\$18,596	\$63,796
Total Project and Admin. Budget	\$107,500	\$266,584	\$374,084

FY05

	<u>Operating*</u>	<u>Salary/Benefits</u>	<u>Total</u>
Travel Outlook and Economic Impacts 2004	\$2,600	\$19,500	\$22,100
2004-05 CTAP and Resident Attitudes	\$5,400	\$29,000	\$34,400
Monitoring Tourism in Montana	\$15,200	\$21,200	\$36,400
Pilot Test: Nonresident and Resident Travel and Recreation Survey	\$2,600	\$12,400	\$15,000
2005 Nonresident and Resident Travel and Recreation Survey	<u>\$36,960</u>	<u>\$147,800</u>	<u>\$184,760</u>
Total Project	\$62,760	\$229,900	\$292,660
Administration	\$54,140	\$17,415	\$71,555
Total Project and Admin. Budget	\$116,900	\$247,315	\$364,215
